

Certification Onboarding and Quick Start Guide

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I. Introduction

Our mission is to build a health care solution that would be good enough for our own family and loved ones. We are devoted to the health and wellness of our members by helping them navigate the healthcare system with service guides, utilizing world-class technology to enable a simplified experience, and partnering with top providers for better health outcomes. Learn more about the Devoted Health Difference.

Important Things to Know

- You must hold an active health insurance license, be contracted, get certified, and be appointed before you can market Devoted benefits.
- If you have completed the Core Medicare training, we accept AHIP, Pinpoint or NABIP (formerly NAHU) certificates. If not, you can now complete the AHIP training by using the **link** in our onboarding workflow and get a \$50 discount at checkout.
- The Devoted Health Agent Certification & Exam informs you on how to compliantly market Devoted Health benefits and satisfy the annual CMS Medicare Compliance Program requirements.
- To receive renewals for business sold in prior years, you must be licensed and appointed to sell Medicare products per state laws and recertified annually.
- Completing the PY2025 Certification will also allow you to market PY2024 benefits in our current service areas.
- A face-to-face certification is not required.

Our PY2025 Onboarding & Certification available in our Agent Portal. Our goal is to keep our onboarding experience easy and allow agents to complete the process in a few simple steps.

Onboarding and certification steps:

- Account creation for our Agent Portal
- W-9 & Direct Deposit (Direct Payees only)
- Preferred Markets (selections here will determine your state appointment(s))
- Selling Needs
- Code of Conduct
- Agent Agreement
- Background Check

- Medicare Core Training or equivalency upload (AHIP, Pinpoint or NABIP (formerly NAHU))
 - CMS Fraud, Waste & Abuse & Compliance Training
- Devoted PY2025 Certification Training & Assessment
 - Agents have 3 attempts to pass the training exam with a minimum score of 85%
 (If unable to pass within 3 attempts, agent will need to recertify for PY2025)
 - Each time the exam is opened (initiated) it will count as an attempt, therefore, it must be completed in one sitting (~40 min).
- License Check
- Appointment

If these steps can't be completed all at once, your progress will be saved and you can continue from the dashboard at a later time.

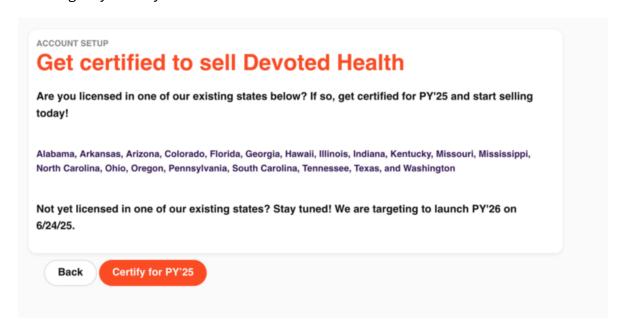
Agents cannot market or sell Devoted Health benefits until they receive the "ready to sell" (RTS) email.

*PY2024 certification is only available for existing Devoted Health service areas.

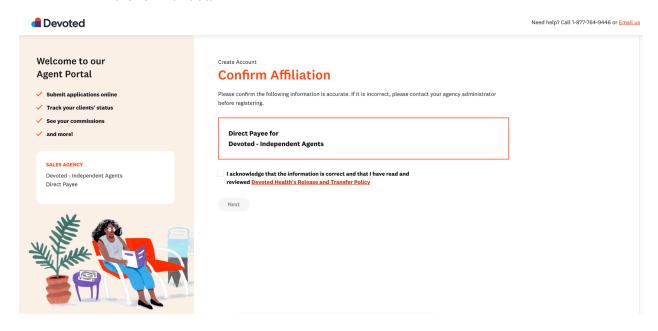
II. Getting Started

Account Creation

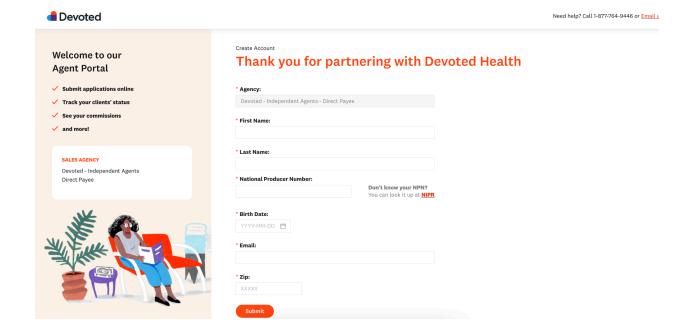
• Click on the link sent to you by your agency and start the account creation process. If you have any questions on how to obtain the link, please contact your agency directly.

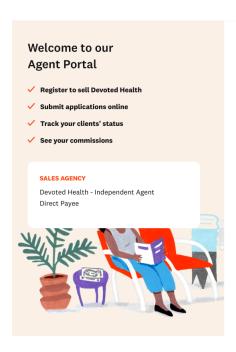


• To ensure you are affiliated with your agency correctly, you will need to confirm the agency and affiliation payee type as seen in the image below. *Please note, all affiliations will need to follow the release and transfer policy outlined in our broker manual.*



- You will be prompted to enter your **Name**, **NPN**, **date of birth**, **email address**, **and zip code**.
 - This will create an account if you do not already have an Agent Portal account setup.
- If your information is already linked to an account, then you will be prompted to <u>log in</u> to your account using your credentials, or contact Agent Support for assistance at 1-877-764-9446.





Thanks! Check your email

You should get a welcome email that will prompt you to finish setting up your account. Don't see one? Email agent-support@devoted.com or call 1-877-764-9446.

Account Setup

• When your account is created, you will receive an email to verify your email address and set a password for your Agent Portal account. Please click the **Create Password** button as seen below:



Welcome to the Devoted Health Agent Portal — where you can sell Devoted easier and faster by submitting applications online, track your clients' status, and see your commissions.

How to Log In

We've already provided you with a username — you'll just need to create a password to access your account.



Use this **Quick Start Guide** to help you get started.

Need help?

agent-support@devoted.com

1-877-764-9446

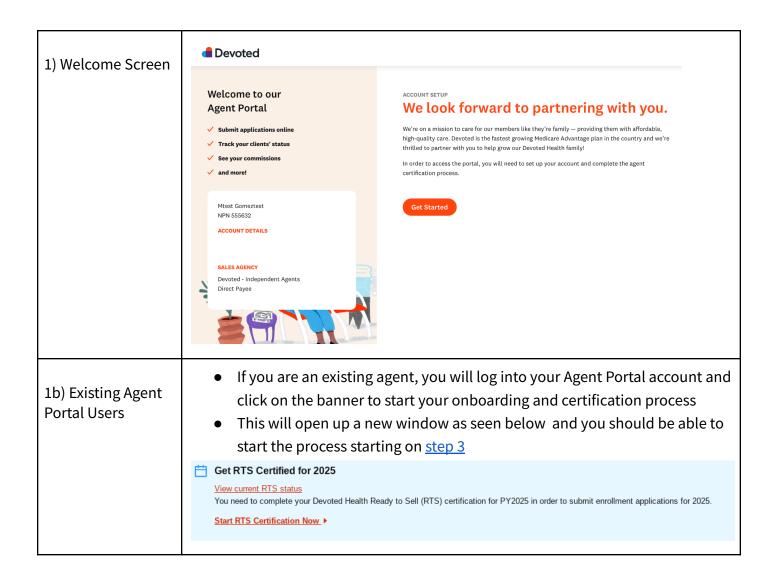
Weekdays, 9am to 10pm Eastern (Dec 8 - Oct 14)

Devoted Health is an HMO and PPO plan with a Medicare contract. Our D-SNPs also have contracts with State Medicare programs. Enrollment in our plans deposition on contract reviews. Our service areas are the following contracts in Product Devoted Hillsborough, Marm-Dade, Ourceda, Palm Back, Predits, Polit and Seminion Counteis and the following countries in Product Devoted Health Country, Marm-Dade, Ourceda, Palm Back, Predits, Polit and Seminion Counteis and the following countries in Texas: Montgomery, Waller, Harris and Forder Bench Devoted Health Complex with applicable Federal Coli (Fight State Search Search). And our product of the Complex of the Countries of the Countries

• You will be prompted to set your password. Once this is complete, you can log in to your Agent Portal account.

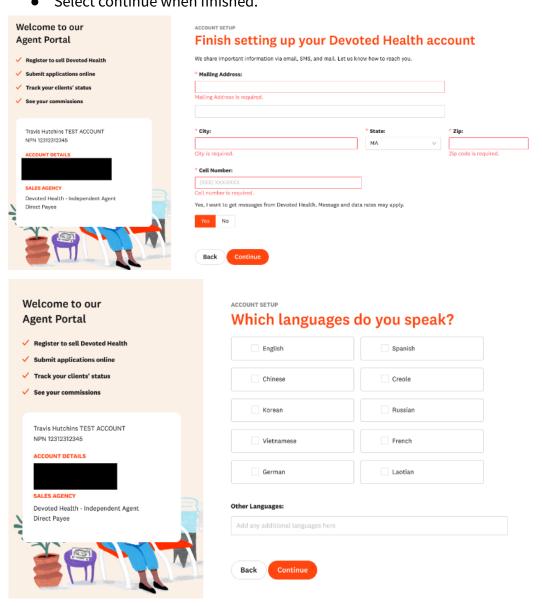
Start the process

You will be able to start our onboarding process by following the easy steps outlined in the images below:



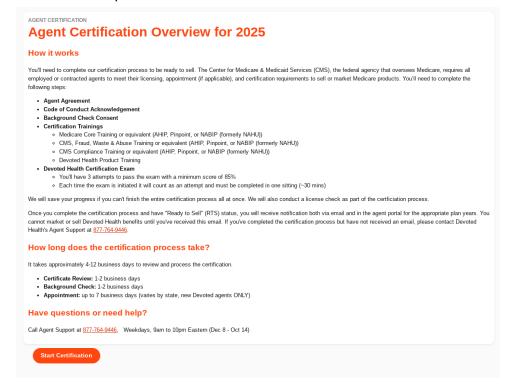
2) Contact Info & Preferred Language

- Enter the full mailing address and mobile phone number.
- We recommend that you **opt in to SMS** by checking the box. This will allow you to receive text notifications for enrollment applications, trainings, events, etc. (You can opt out at any time)
- Next, select your language preference.
- Select continue when finished.

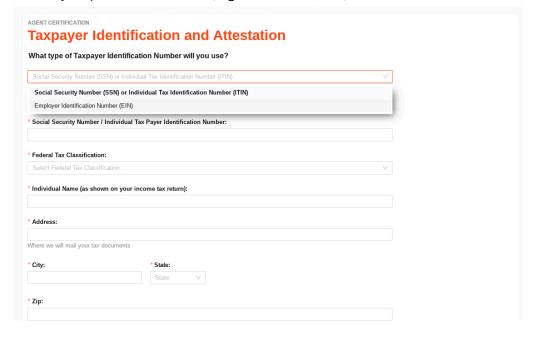


3) Certification Overview - *All users*

 "Overview" provides key information related to the certification process and next steps.



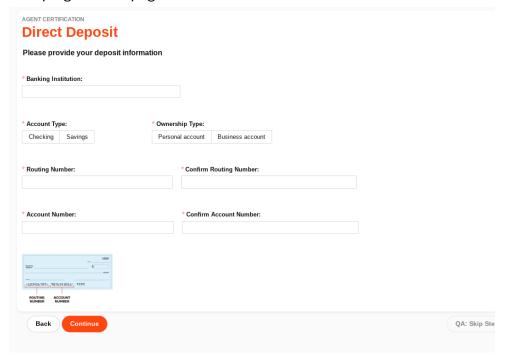
4) Taxpayer Identification and Attestation (W-9) -(Direct Payee Only) • Enter your most up-to-date tax information. This will be used to process any required documents (e.g. 1099 forms, etc).





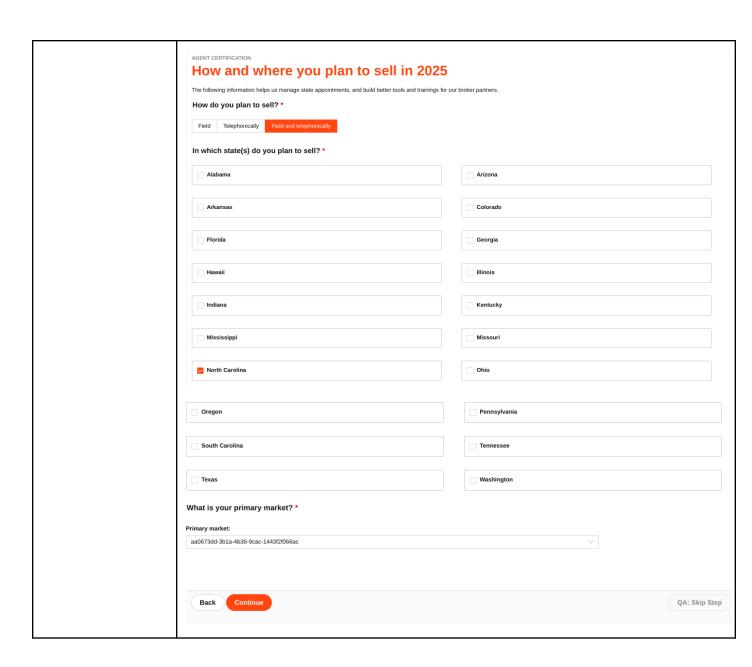
6) Direct Deposit - (Direct Payee only)

• Fill in your current direct deposit information. Note - you will be able to update this information at any time from the "My Account" option on the top right of the page.

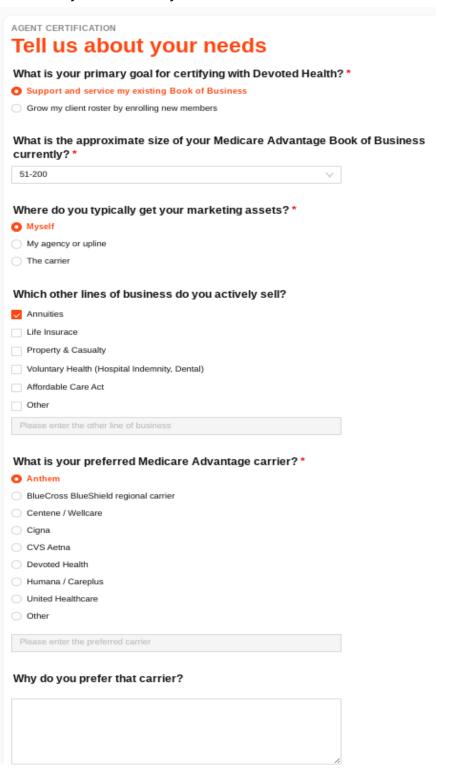


7) Preferred Markets

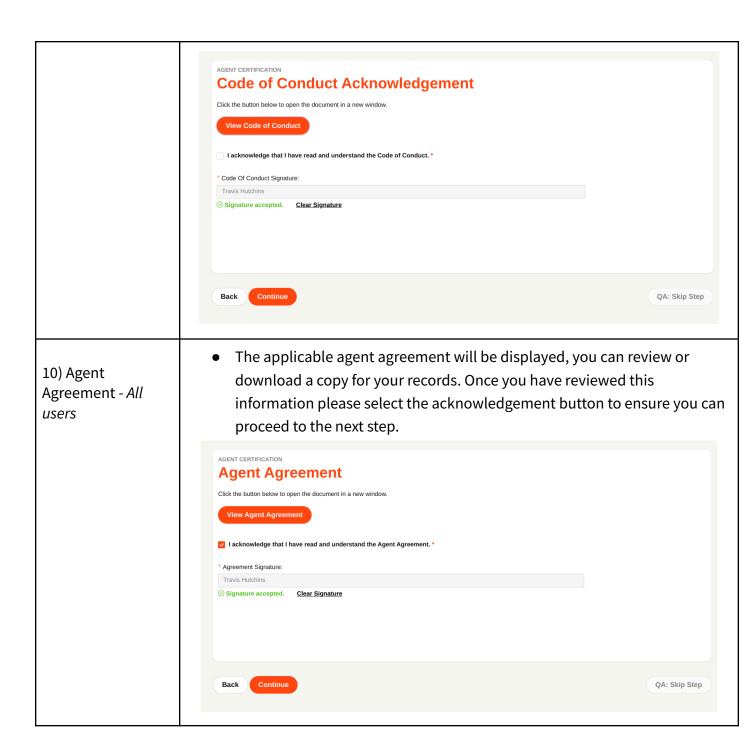
- Select which model of sales applies to you (field sales, telesales (your agency is approved by DH), or both).
- Ensure to make a selection for **each of the states you will like to be appointed in**. If you do not select the applicable state(s) available, you will not be appointed for that state(s). You will also be prompted to select your primary selling market. The primary market counties will also be visible during your selection. Please note this will not prevent you from selling/market in other markets, you can update in the future as noted in the "Update your State" License section.



8) Your Selling Needs - *All users* • Providing this information will let us know how we can better partner with you. We deeply value your feedback so please answer all of the questions to the best of your availability.

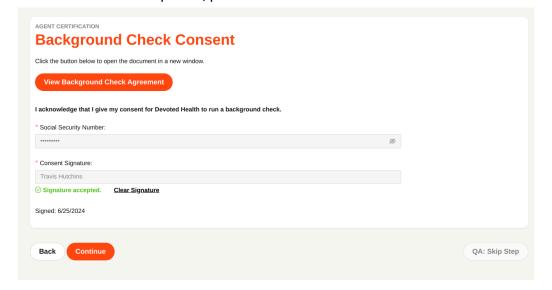


	Approximately how much of your annual Medicare Advantage business do you sell during AEP, relative to OEP and lock-in? *	
	● 0-25%	
	25-50%	
	50-75%	
	75-100%	
	0.12.200	
	How do you typically submit enrollment applications to the carrier?*	
	Electronically through the Carrier Portal	
	Electronically through other platforms (e.g. Connecture, Sunfire, MedicareCenter, etc)	
	Paper (via mail or fax)	
	Other	
	Please enter how you submit enrollment applications	
	If you haven't enrolled a member with Devoted Health yet, what would help you write your first application for us?	
	Back Continue	
	The code of conduct will be displayed, you can review or download a conv	
9) Code of Conduct - All users	The code of conduct will be displayed, you can review or download a copy for your records. Once you have reviewed this information please select the acknowledgement buttons below to ensure you can proceed to the next step.	



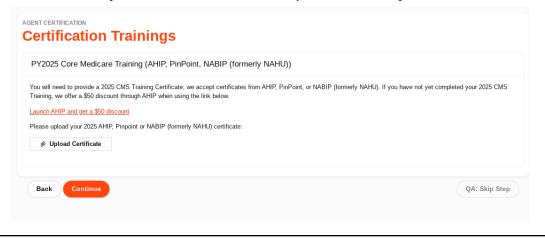
11) Background Check Consent - All users

- The Background check consent will be displayed for your review.
- Once you have reviewed this information you must enter your social security number.
- Click in the box to sign the form and type in your full name.
- The date will be preset, please select the continue button.



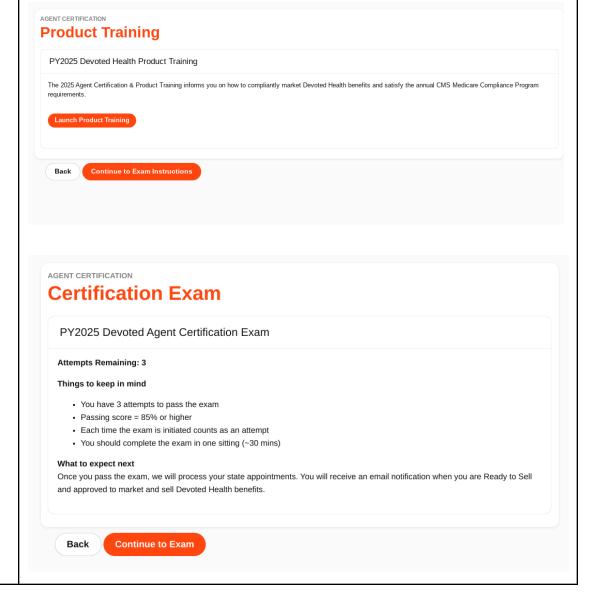
12) Certification Trainings - *All users*

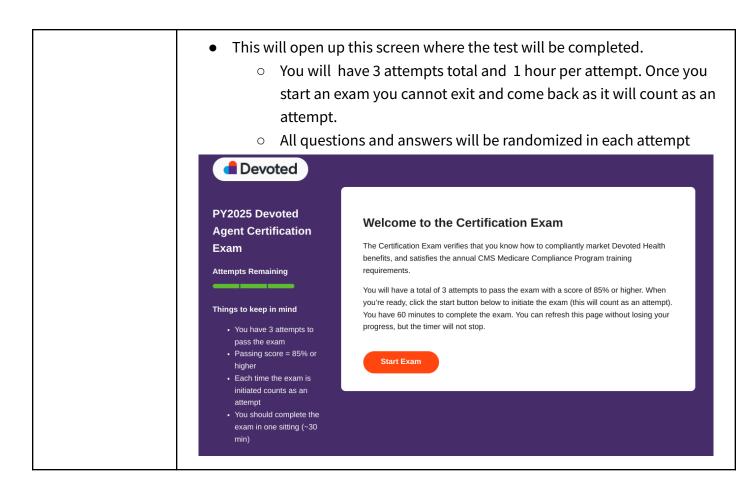
- If you have a completed AHIP, PinPoint, or NABIP (formerly NAHU) certificate, upload a copy by selecting the upload certificate button.
- You can complete the AHIP certificate by clicking the launch AHIP link it will open up the AHIP site where you can get a \$50 discount at checkout.
- Please note If you have completed the AHIP course <u>while using our link</u> <u>you can have your score "transmitted" to Devoted Health</u> once you have access to your certificate. This can help us to confirm your results!



13) Certification Exam - *All users*

- Access our Devoted Health Product Training by clicking the Launch
 Product Training button in the center of the page as seen below.
 - This will go through a presentation that will have an interactive experience and guide you through our product offerings, markets, and much more.
 - Please note if you have to leave the training for any reason your progress will now be saved.
- Once you have completed the training, you will select the Continue to Exam Instructions button at the bottom of the page. Then select Continue to Exam.

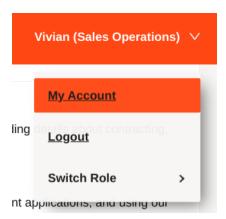




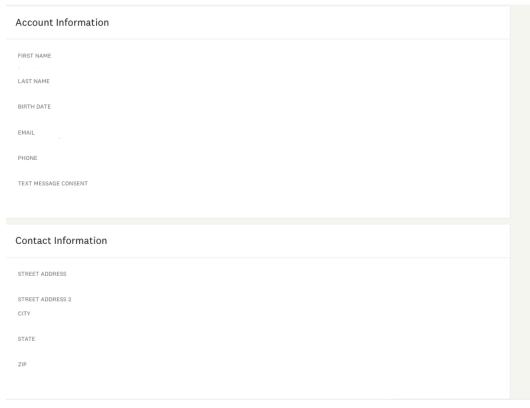
III. Update your Demographics & Financial Information

You can view and update your financial information in your Agent Portal account by following the steps outlined below:

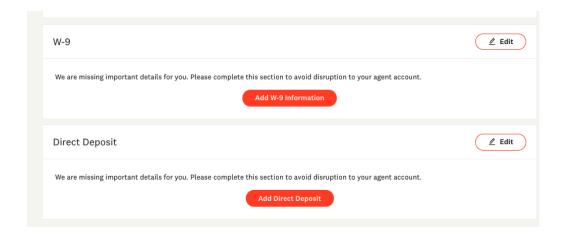
- Login to your **Agent Portal** account.
 - If you need assistance with your username as password credentials please contact us.
- On the top right hand corner of the page you will see your name, select it and you will see a dropdown menu.
 - Select "My Account".



• This will display your demographic and financial information as seen below:



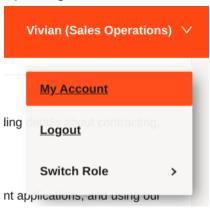
- o If you need to update your financial information
- Click on the "Edit" button in the W-9 or Direct Deposit section to make the necessary changes



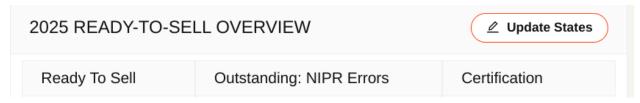
Update your State Licenses

You can easily update the states where you're licensed directly in your Agent Portal. Just follow the steps below:

• Log in to your Agent Portal account. In the top right corner, click on "My Account".



- Go to the "Ready to Sell Overview" section.
- Click on "Update States."



 Select or remove states as needed. Choose the states you are currently licensed to sell in. Once you've made your updates, click "Save."



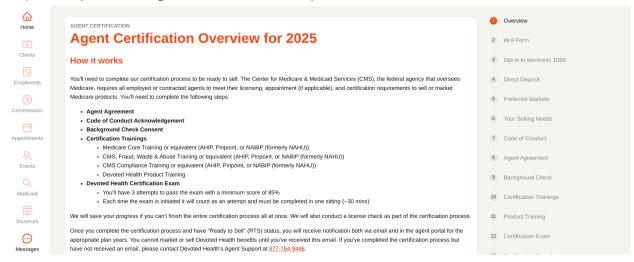
Important:

Agents are only permitted to market and sell in states where they are both licensed and have selected the state in their Devoted Health profile.

IV. Messages

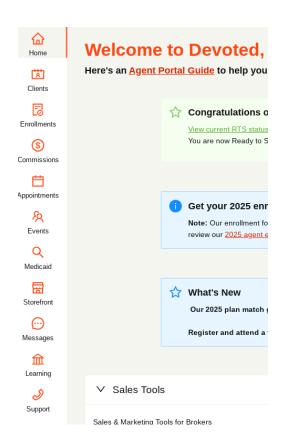
Onboarding Status

If you have any questions or concerns during onboarding, you may contact our Devoted team by calling into the Agent Support line or send a message on your Agent Portal account. The messages icon is located on the side menu to the left of the page. Our Agent Support team will respond to your message within 2 business days.



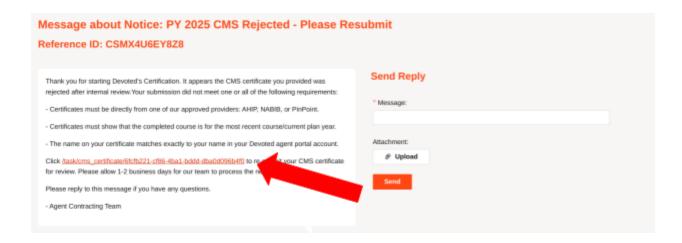
In Review and Active Status

When you have completed certification, the rest of the icons on the side menu will also be displayed. *Please note, agents in review status will not be able to access the Storefront until certified.*

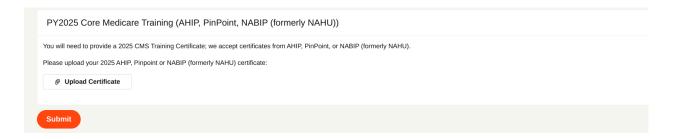


Rejected CMS Certification

If the CMS certification submitted during onboarding does not meet the requirements, you will receive a message from Devoted. The message will look like this:



• To upload the new certificate, click on the link in the message. The link will redirect you back to the certification workflow to reupload the certificate as shown below.



• Click the Upload Certificate button and upload the correct file. Once the file has been uploaded, click the submit button to load the new file.

Important

Please allow 2 business days for our Sales Operations team to review the newly uploaded certificate.

Questions?

Contact us at 1-877-764-9446 or send us a message on your Agent Portal account. Or contact your local <u>Devoted Sales Leader</u>.